AT-PMTECH® SOLUTIONS

Instructor-Led Project Management Professional (PMP)® Exam Prep Course

Execution, Monitoring, Change, and Impediments

Lesson 7

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LESSON INTRODUCTION

In this lesson, we will explore the following tasks, as outlined in the **Project Management Professional (PMP)®** Certification Exam Content Outline :

01 Evaluate Project Status and Manage Artifacts **(ECO 2.9)**

02 Manage and Control Changes **(ECO 3.3)**

03 Remove Impediments and Manage Issues **(ECO 3.4)**

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Evaluating Project Status and Manage Artifacts

PMP ECO Task 2.9

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Developing Project Metrics, Analysis, and Reconciliation

01 Identifying and Tailor Needed Artifacts

02 Helping ensure Artifacts are Created, Reviewed, Updated, and Documented

03 Helping Ensure Accessibility of Artifacts

04 Continually Assess the Effectiveness of Artifact Management

PMP ECOs 2.9.1, 2.9.2, 2.9.3, 2.9.4, and 2.9.8

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Standardize Artifacts: What to Include

01 A simple way to produce and control documents

02 Standardized formats and templates

03 A structured process for the review and approval of documents

04 Version control and security

05 Timely distribution of documents

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Information Storage and Distribution Good Practices

01 Select an accessible location.

02 Use information radiators to make work visible.

03 The storage and distribution system should match the complexity of the project.

04 Use cloud-based systems for larger projects, especially if team members are geographically distributed.

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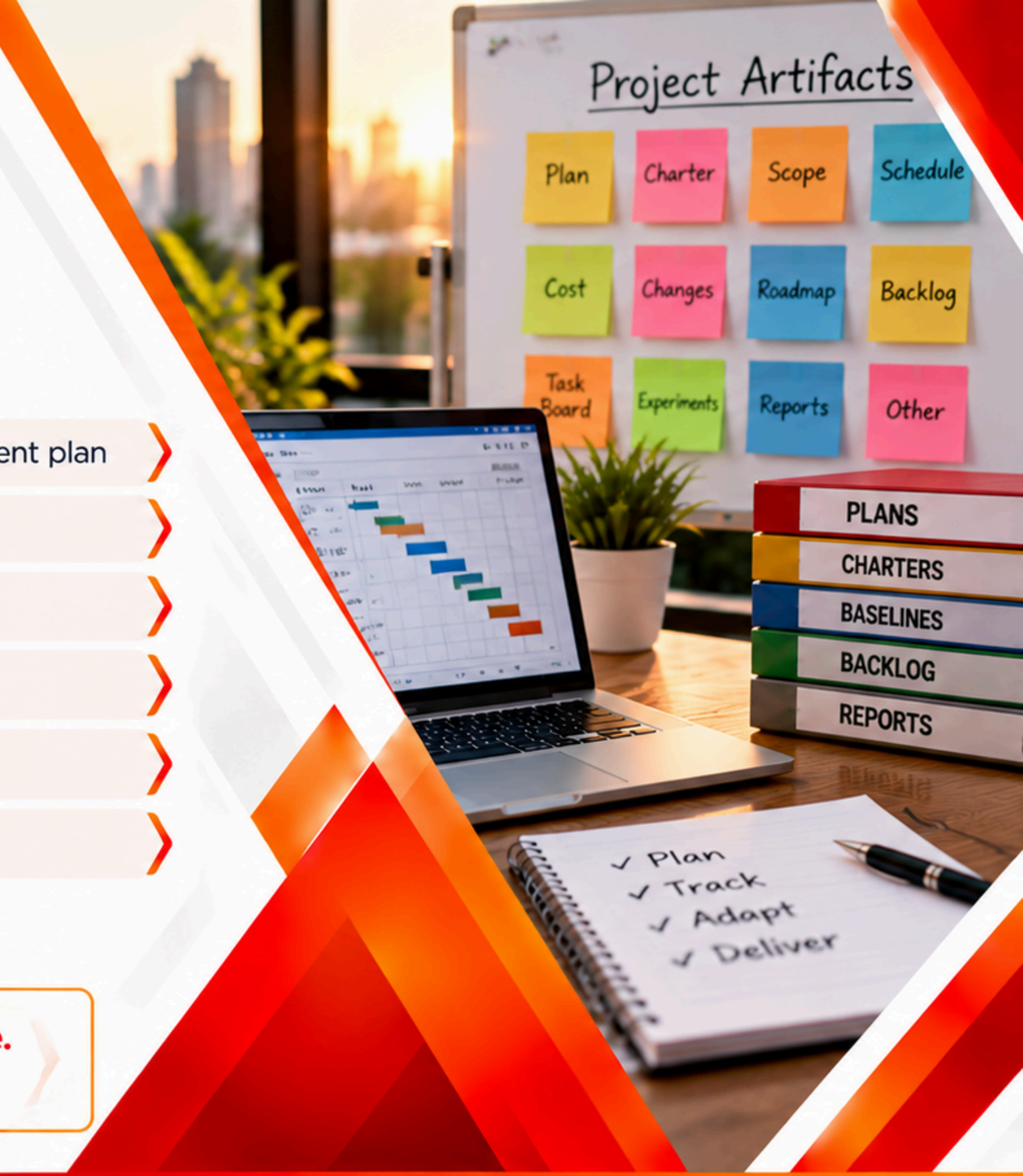
Tailoring Artifacts

- Project management plan
- Project charter
- Change requests
- Scope baseline
- Schedule baseline
- Cost baseline
- Subsidiary project management plans
- Project management plan
- Product roadmap
- Task boards
- Experiments
- Product backlog
- Sprint backlog

These lists are typical, not exclusive or prescriptive.
Tailor the artifact type and use to your project.



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Maintaining Artifacts

01 Configuration management plan

02 Project management plan component

03 States how project information (and which items) will be recorded and updated

04 Facilitates consistency of the product, service, or result of the project and operability

05 Configuration management system — A collection of procedures used to track project artifacts and monitor and control changes to these artifacts.

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Work Information Management Systems

Project Management Information Artifact System (PMIS) Management Systems

Gather, integrate, and share project data.

Store and maintain project artifacts.

Help ensure consistency in collection and reporting.

Examples of Work Information Management Systems

Microsoft SharePoint or Teams

Microsoft Project or similar

Google Drive

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Version Control

This is a subset of configuration management related to documents and digital recordkeeping.

For each update, include:

- A new version number
- A date and time stamp
- Name of user who made the changes

Apply version control to all artifacts, especially important ones like the project management plan.

VERSION CONTROL

A system that records changes to a file in a way that allows users to retrieve previous changes made to it.

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Monitoring Artifact Maintenance

- Make it part of regular quality checks.
- Keep file storage organized and versioned.
- Help ensure compliance with data protection and security mandates.
- Maintain artifacts in preparation for archiving during project closure.

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Assessing Current Progress

PMP ECO 2.9.5

Review planned work and actual results.

Analyze progress against objectives.

Identify variances and trends.

Determine corrective actions as needed.

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Performance Assessments

01 Identify strengths, weaknesses, aspirations, and preferences.

02 Discover opportunities for improvement.

03 Use formal and informal assessment methods.

04 Self-organized adaptive teams in psychologically safe environments assess and regulate their own performance.

05 Conduct assessments when team members join and then monitor progress.
The focus is on the team, rather than on individuals.

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Performance Assessment Tasks

01

Compare performance to goals.

02

Reclarify roles and responsibilities.

03

Deliver positive as well as negative feedback.

04

Discover unknown or unresolved issues.

05

Create and monitor individual training plans.

06

Establish future goals.

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Guidelines to Measuring Performance

> “What matters most is measuring what matters most.”
>
> — John Doerr

Tailor performance measurement to the project context and stakeholders:

Scope
Percentage of work completed

Schedule
Actual duration of work against projected start and finish dates

Budget
Actual costs
Check procurements are sufficient for needs

Resources
Team allocations/availability/procurement

Change requests

Performance appraisals
Team, including vendors

Contract management
Quality
Technical performance
Defects

Risk
Risk register

Doerr, J. (2018). *Measure what matters: How Google, Bono, and the Gates Foundation rock the world with OKRs*. Portfolio/Penguin.

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Reporting on Performance: Tailoring as Needed

Milestone schedule	A type of schedule that presents milestones with planned dates.
Quality reports	Charts and reports based on the collected quality metrics.
Earned value management (EVM) reports	Graphs and values based on EVM equations.
Variance analysis reports	Graphs and their analysis comparing actual results to expected results.
Work performance reports	Physical or electronic representation of work performance information compiled in project documents, intended to generate decisions, actions, or awareness.
Dashboards	Physical or electronic progress summaries, usually with visuals or graphics to represent the larger dataset.
Earned value management	Performance measurement that integrates scope, schedule, and cost to show how work performed compares to the plan and forecast outcomes.

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Measuring, Analyzing, and Updating Project Metrics

Communicating Project Status

PMP ECO 2.9.6 and 2.9.7

Measure › Analyze › Update › Communicate

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Visualizing Performance

01	**Show committed versus completed work:**	Display visuals or graphics on team dashboards (electronic or physical).
02		Show product backlog progress on burndown and burnup charts.
03		Display project data and progress on graphic information radiators in prominent places.
04		Measure performance with lead and cycle times with a cumulative flow diagram.
05		Adaptive approaches may use kanban or task boards to visualize project work.
06		Continuous flow approaches include throughput, cycle time, and lead time.
07		Timeboxed approaches include velocity.

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Information Radiators

Visual example of an information radiator displaying project information in a prominent location.

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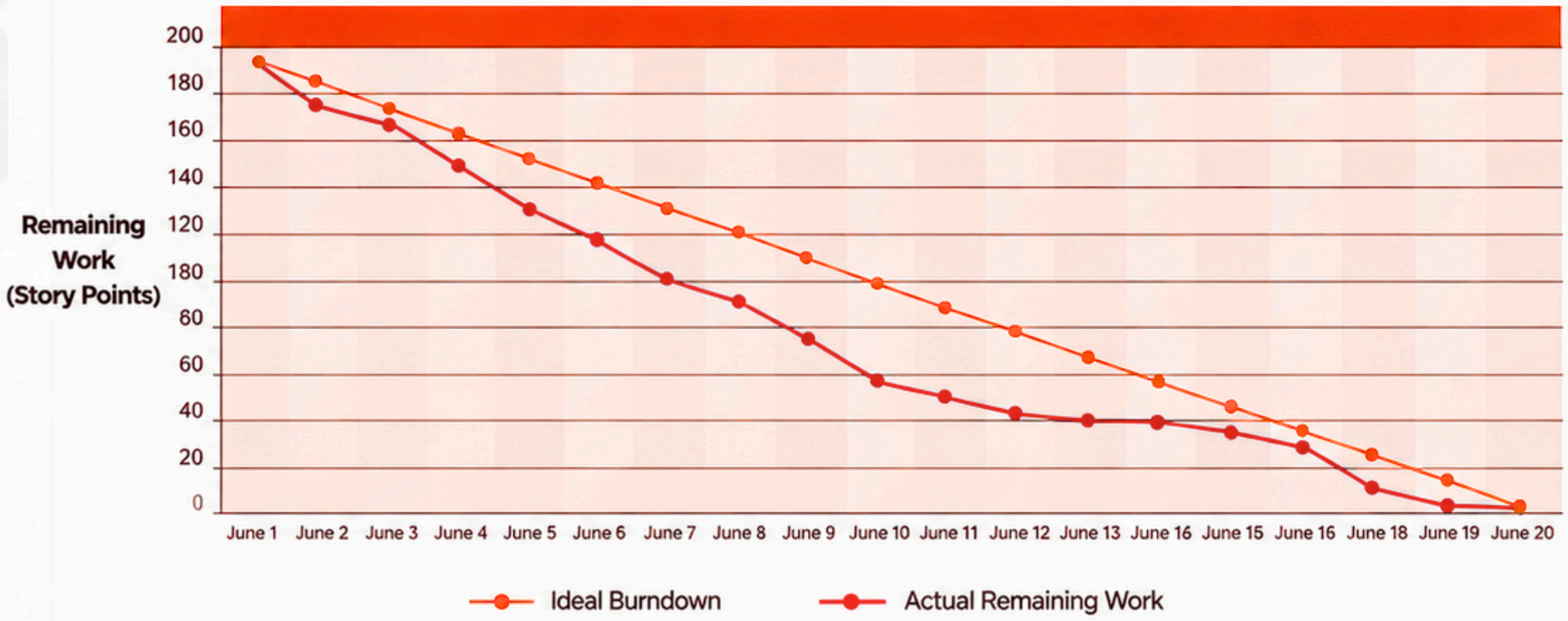
Burn Charts: Burndown Chart (Iteration)

- Track the work to be completed in the iteration.
- Use to analyze variance to ideal burndown of work committed to during planning.

The diagonal line is the **ideal burndown rate,** against which daily actual remaining is charted.

Iteration Burndown Chart



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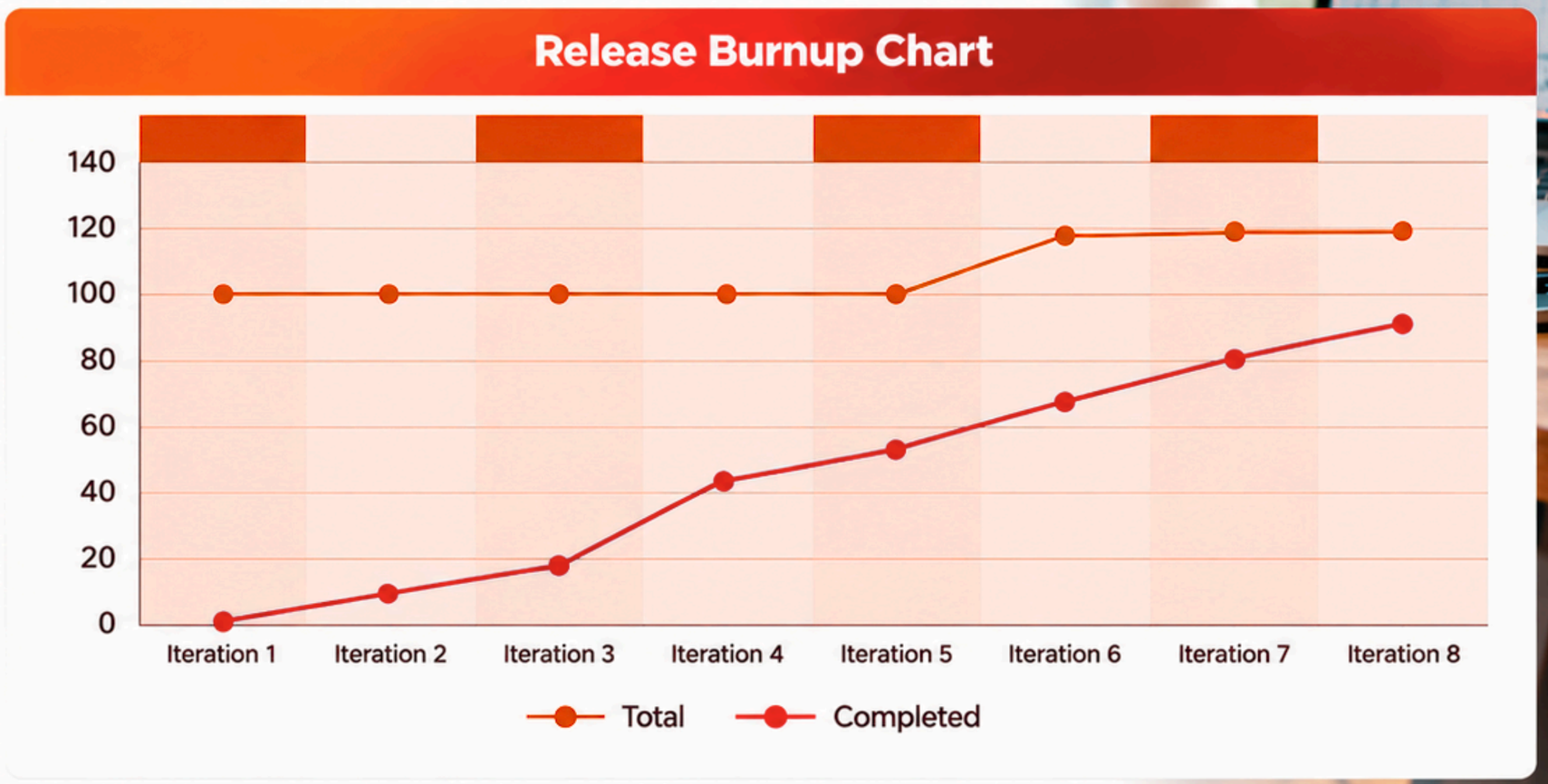
Burn Charts: Burnup Chart (Release)

- Shows accumulated progress of completed work.
- Updated after each iteration.

Also known as a **feature complete graph** in feature-driven development (FDD).



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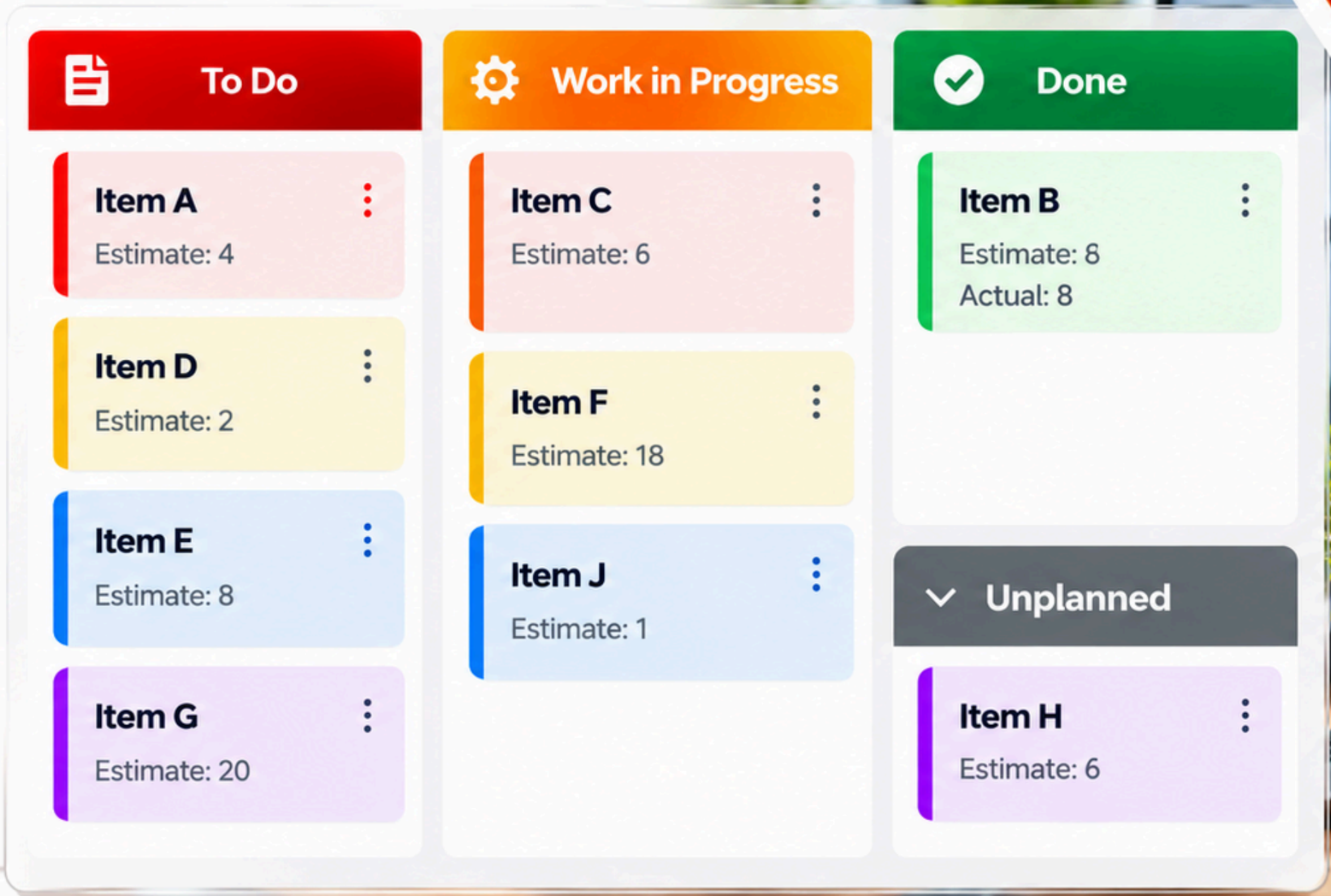
Task Boards

- Organize work into tasks on cards.
- Display task information at every stage of the workflow.
- Tailor your task board workflow stages. Task board types include Kanban, to-do lists, procedure checklists, and Scrum boards.



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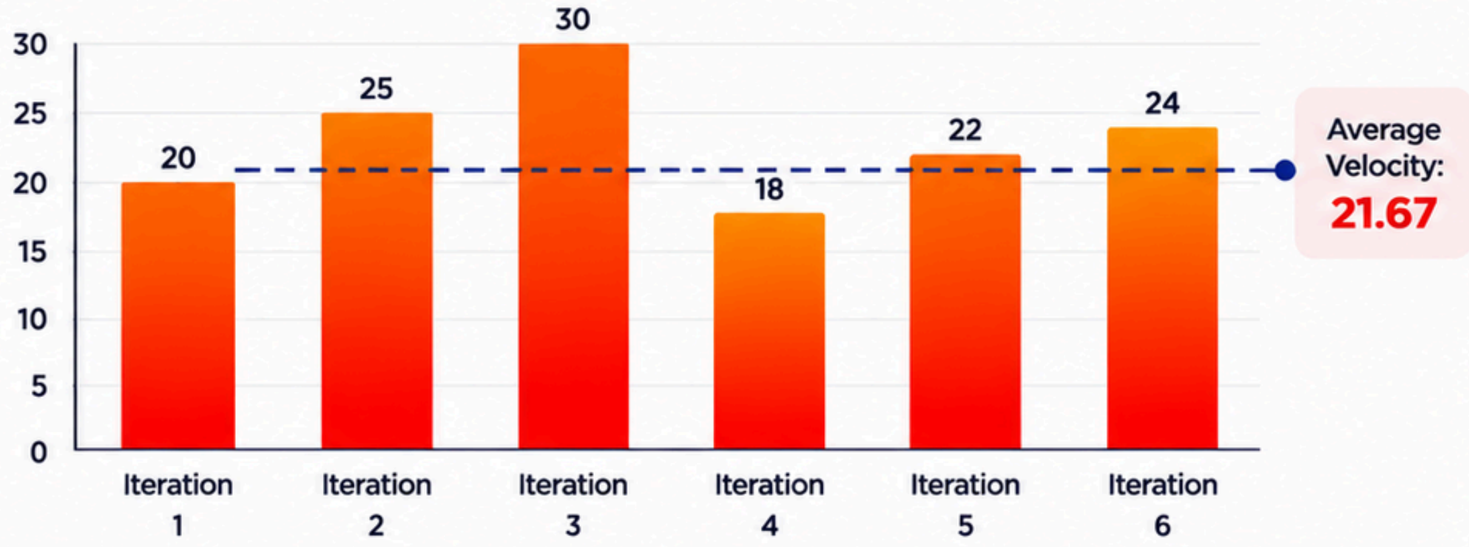
Velocity: Aiming for Constant Rate

- **What:** Velocity is a measure of a team's productivity rate at which the deliverables are produced, validated, and accepted within a predefined interval.
- **How:** It is calculated by estimating the number of story points that can be completed during an iteration. The velocity then gets modified during subsequent iterations.
- **Why:** The goal is to achieve a constant rate of velocity from one iteration to the next.

Velocity in Story Points



Velocity is a unique metric to a project; it can't be used to compare the performance of teams.

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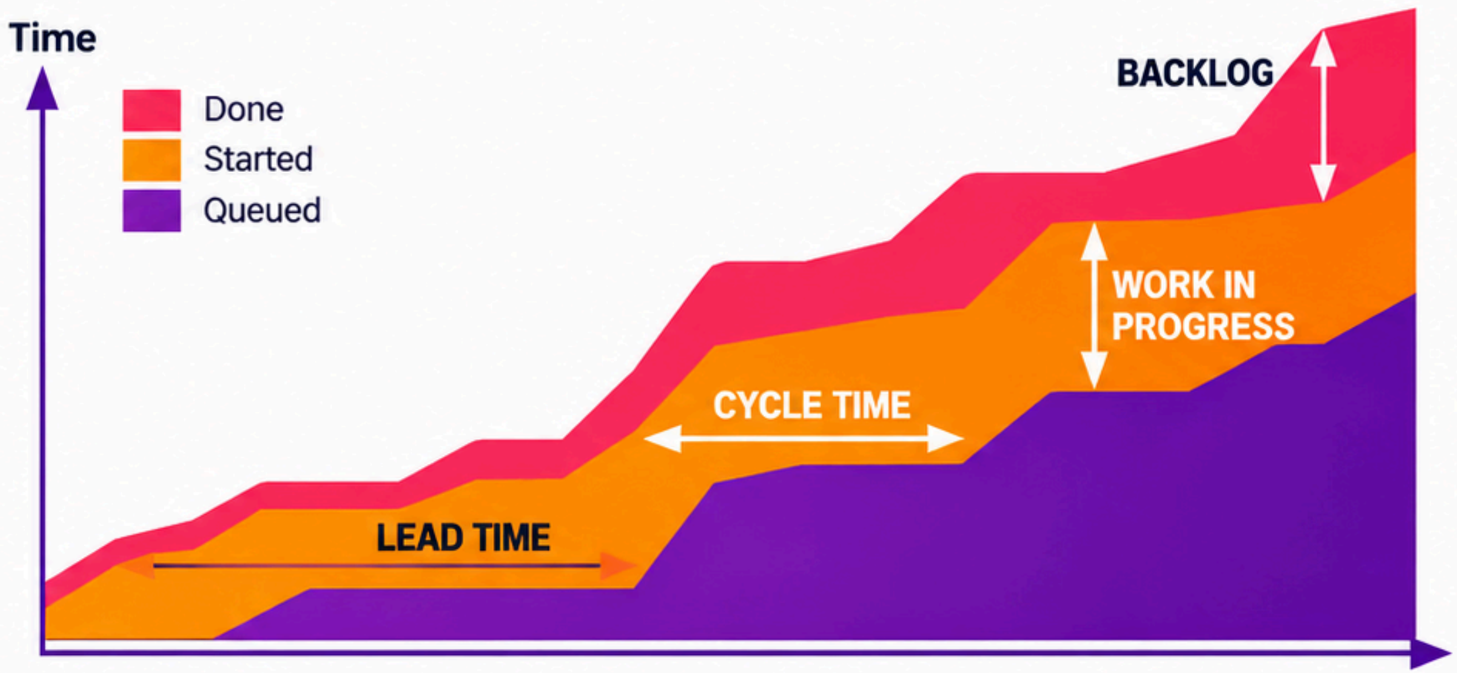
Continuous Flow: Throughput, Lead Time, and Cycle Time

- **Work in progress:** Measure of work in progress but not completed.
- **Lead time:** Length of time it takes a work item to go through the entire process.
- **Cycle time:** Length of time the work item is being worked on.
- **Throughput:** Number of items entering or exiting the system.

Cumulative Flow Diagram



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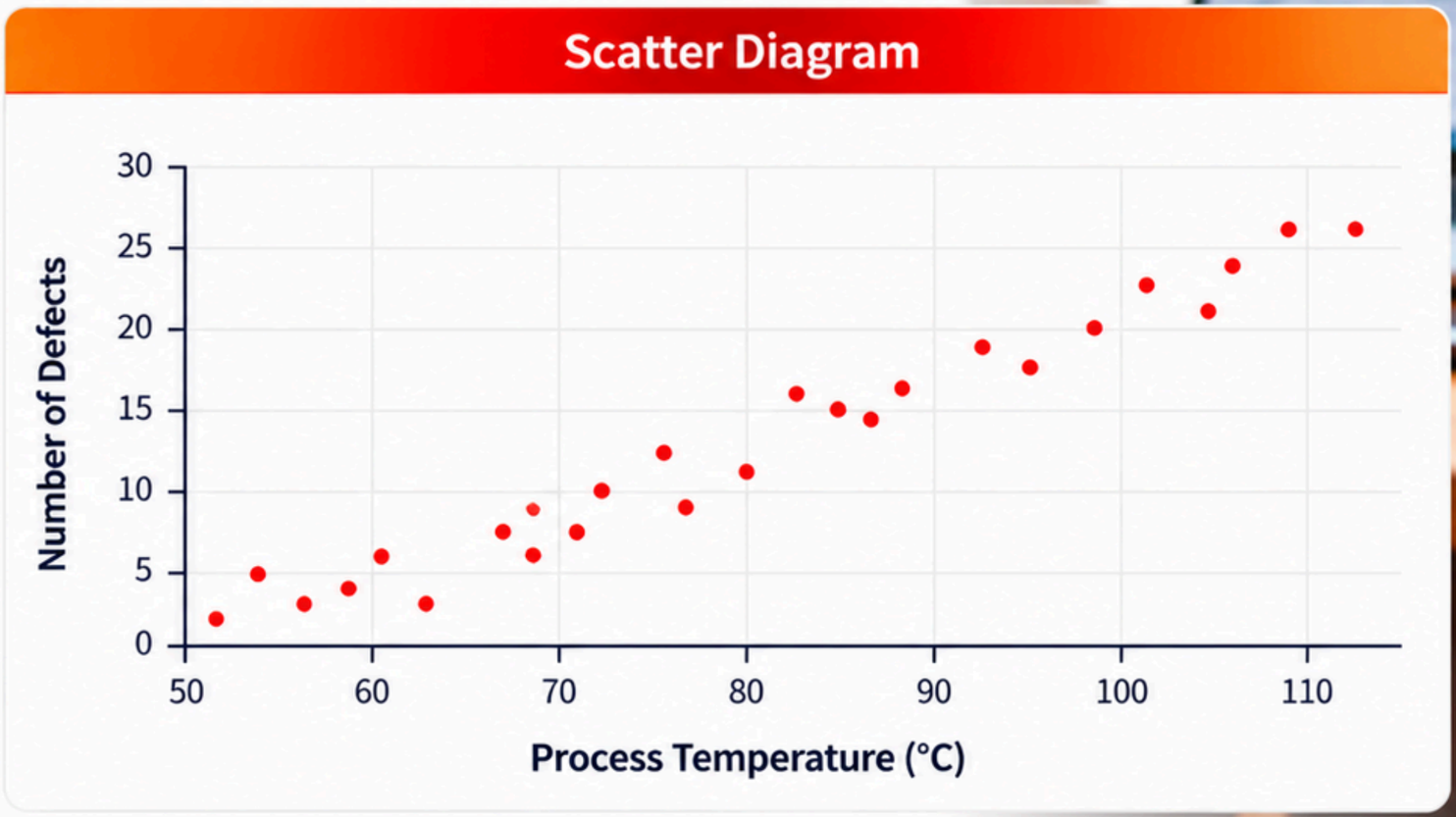
Data Visualization: Scatter Diagrams

- A tool that shows the relationship between two variables.
- A scatter diagram demonstrates relationships among any element of a process, environment, or activity on one axis and a quality defect on the other.



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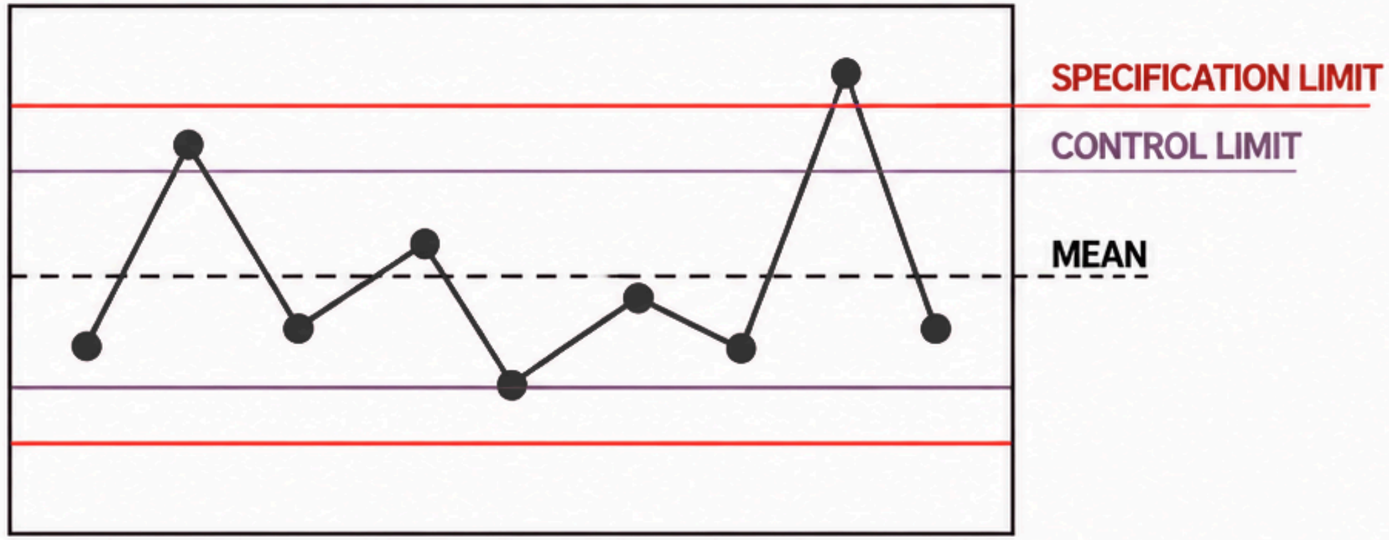
Data Visualization: Control Charts

- A tool used to determine the predictability, behavior, and stability of a process over time.
- Ideal for repetitive processes with predictable results.
- Shows a mean and established control limits and specification limits.
- Follow the **"rule of seven:"** Investigate increases or decreases of seven consecutive points, indicating a trend or potential issue.

Control Chart



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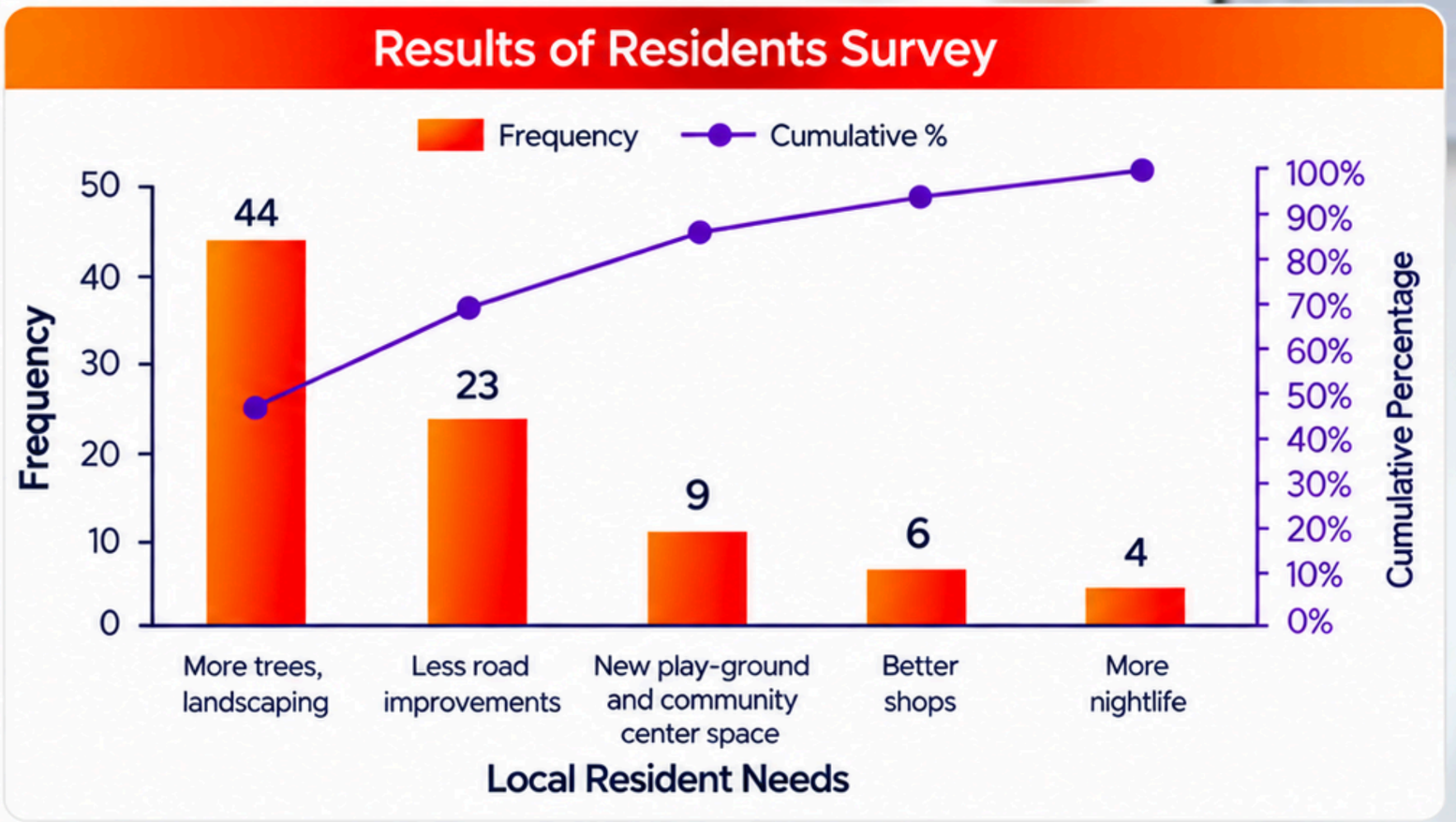
Data Visualization: Histograms and Pareto Charts

- A Pareto chart is a type of 100% histogram that:
- Uses the 80/20 rule
- Demonstrates frequency of problem occurrence
- Analyzes datasets related to a specific problem or issue, but does not define the root cause of a problem



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Some Definitions

HISTOGRAM

- A bar chart that shows the graphical representation of numerical data.

80/20 RULE

- A general guideline with many applications; in terms of controlling processes, it contends that a relatively large number of problems or defects, typically 80%, are commonly due to a relatively small number of causes, typically 20%.

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Planning and Controlling Changes

PMP ECO Task 3.3

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Executing the Change Control Process

PMP ECO 3.3.1

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Interactive Discussion

- What constitutes a change in a project?
- Can a change can come from anywhere?
- How does the life cycle and development approach affect our response to change?

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Managing Change: Overview and Controls

Overview	Controls
Assess and Implement Changes process	• Assess and Implement Changes process • Change request process • Change control board (CCB) • Artifact management (updates)
Feedback and development cycle	• Product owner role: Key decision-maker and runs backlog • Everyone participates in backlog refinement. • Use demos to understand requirements. • No changes allowed during a sprint.
Any of the above	Any of the above

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Monitoring New Work and Changes in Predictive Projects

- Changes are managed by the team.
- Evaluate risks when changes in scope are introduced.
- The project manager and change control board guide requests through the process.

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The Perform Integrated Change Control Process

- Review of change requests conducted throughout the project and is the responsibility of the project manager.
- Changes should be recorded in writing and entered in a change management system.
- Change control board (CCB).

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Change Control

Questions about Change	Typical Answers
Who can propose a change?	Roles are assigned
What exactly constitutes a change?	A change is proposed or an event changes one of the project baselines or measures
What is the impact of the change on project objectives?	Recommend evaluation method
What are steps to evaluate a change request before approving or rejecting it?	Required steps per quality policy
Who has the authority to approve various types and levels of change?	Change control board (CCB), other approvals
When a change request is approved, what project documents will record the next steps (actions)?	Change log
How will you monitor these actions to confirm completion and quality?	Quality metrics, risk assessment and RACI (responsible, accountable, consulted, informed) matrices, information radiators

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Causes of Project Changes

- Inaccurate initial estimates
- New regulations
- Missed requirements
- Specification changes
- Are any of these also causes of changes in adaptive projects?

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Four Types of Change Requests

Corrective action: Adjusts the performance of the project work with the project management plan.

Preventive action: Helps ensure future performance of the project work with the project management plan.

Defect repair: Modifies a nonconformance within the project.

An update: Updates a baseline or other controlled document such as a contract.

Can you think of examples of each change request for one of your projects?

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Change Control Systems:
Change Control Board

Forms, tracking methods, processes, and approval levels required for authorizing or rejecting requested changes.

One approval level may be the change control board (CCB), which handles some change requests based on the approval levels documented in the change management plan.

CHANGE CONTROL BOARD (CCB)

A formally chartered group responsible for reviewing, evaluating, approving, delaying, or rejecting changes to the project and for recording and communicating such decisions.

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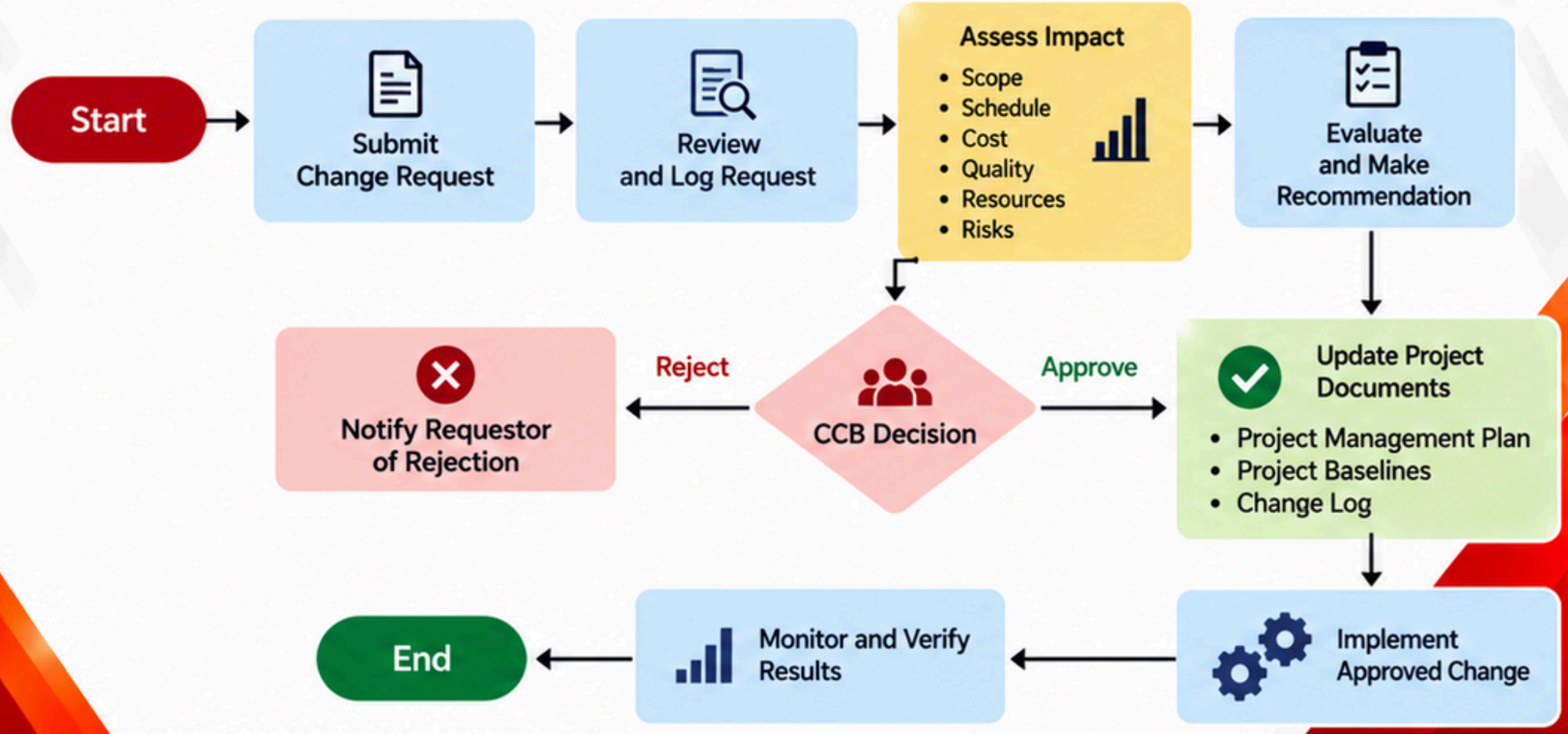
Predictive Change Management
Process Flowchart



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Monitoring New Work and Changes in Adaptive Projects

- Work evolves and adapts.
- The project manager and the product owner work together to manage expectations.
- The product owner prioritizes the backlog on an ongoing basis.

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Managing Contract Changes and Resolving Problems

- Work with the vendor to manage contract changes.
- Work with partners in the organization (e.g., procurement, finance, functional departments) and act within the project manager's or team's domain/threshold.
- Legal problems that are serious enough to cause issues may need expert help.

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Contract Change Control System

The system used to collect, track, adjudicate, and communicate changes to a contract.

Might be a component of the integrated change control or a separate organizational system.

Specifically dedicated to control contract changes.

Specifies contract change dispute-resolution processes, and approval levels.

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Types of Contract Changes

Which kinds of contract changes do you think are more likely to cause conflict? Why? How can these be avoided?

Component	Description
Administrative changes	Nonsubstantive changes, usually about contract administration method
Contract modification	Substantive change to contract requirements or product requirements
Supplemental agreement	An additional agreement related to the contract but negotiated separately
Constructive changes	Changes made by the buyer through action or inaction
Termination of contract	Vendor default or buyer's need changes

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Legal Concepts When Managing Disputes

Seek legal advice if the terms of a contract have not been met.

Negotiate settlements to arrive at a final equitable settlement of all outstanding issues, claims, and disputes by negotiation.

Legal Issue	Description
Warranty	A promise, explicit or implied, that goods or services will meet a predetermined standard. The standard may cover reliability, fitness for use, and safety.
Waiver	A legally binding provision in which one party in a contract agrees to forfeit a claim without the other party becoming liable, even inadvertently.
Breach of contract	Failure to meet some or all the obligations of a contract. It may result in damages paid to the injured party, litigation, or other ramifications.
Cease and desist letter	A letter sent to an individual or a business to stop (cease) allegedly illegal activities and to not undertake them again (desist); often used as a warning of impending legal action if it is ignored.

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Being a Changemaker and a Change Leader

Which of the project management principles deal with the subject of change?

- Adopt a holistic view
- Focus on value
- Embed quality into processes and deliverables
- Be an accountable leader
- Integrate sustainability within all project areas
- Build an empowered culture

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Communicating the Status of Proposed Changes

PMP ECO 3.3.2

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Communicating the Status of Proposed Changes

1. Communications management plan
2. Change log or register
3. Meet with decision-makers
4. Reports and document decisions
5. Communicate impacts

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Implementing Approved Project Changes

PMP ECO 3.3.3

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Implementing Approved Changes

1. Incorporate changes into project documents.
2. Update project management plans.
3. Communicate with stakeholders.
4. Reassign roles.
5. Implement actions promptly.
6. Monitor and control changes.
7. Document the process.

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Sound Practices

Follow the process

Adhere strictly to organizational policies and workflows for approvals and implementation.

Use the tools

Leverage project management software or systems like a project management information system (PMIS) for tracking and auditing changes.

Align changes with baselines

Always revisit project baselines to help ensure the adjustments fit within the updated scope, cost, and schedule parameters.

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Updating Project Documentation to Reflect Changes

PMP ECO 3.3.4

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Updating the Project Management Plan

Based on the scope of changes, you may need to update:

- Scope
- Timelines
- Work packages
- Team member assignments
- Baselines

Adaptive teams might remove lower-value deliverables from the scope to make room for the change.

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Removing Impediments and Managing Issues

PMP ECO Task 3.4

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Impediments, Obstacles, and Blockers

Since the project team generates most of the business value, it is critical for the project manager to **maximize delivery** by removing anything that hinders their progress.

Impediments

Issues that slow down the progress of a project but do not completely halt it.

Obstacles

Obstacles are challenges that require a strategic approach to overcome.

Blockers

Blockers completely stop progress on a project.

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Issue or Impediment?
Just Solve the Problem!

Issue: A condition or situation that may have an impact on the project objectives.

Impediment: An obstacle that prevents the team from achieving its objectives, also known as a blocker.

Predictive teams use the term **issue log.**

Adaptive teams tend to use an **impediment log.**
This term is related to Scrum.

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Evaluating the Impact of Impediments

PMP ECO 3.4.1

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Identifying Impediments

- Daily Retrospectives meetings
- Watch for coordination bottlenecks
- Monitor dependencies
- Track historical data

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Using a Tracking System

To monitor Impediments, obstacles, and blockers:

Implement a system (spreadsheet, kanban board, or project management tool).

Record:

- Who reported the issue
- Its impact
- Who is responsible for resolving it

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Analyzing Impact and Urgency

Start by analyzing how each impediment impacts your project's scope, schedule, cost, quality, or risk.

Prioritization matrix

Helps project teams focus on the most critical issues.

Maps issues based on impact and urgency.

Functions like the impact/urgency matrix used in risk evaluation.

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Analyzing Dependencies

Examine if the impediment creates **bottlenecks** or directly impacts **dependencies** between tasks or teams.

Assess its ripple effect on project **milestones** and **deliverables.**

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Prioritizing and Highlighting Impediments

PMP ECO 3.4.2

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Prioritizing Issues

How to prioritize and escalate critical blockers:

- Prioritize impediments based on their impact on scope, cost, or schedule.
- Address the most critical impediments first.
- Escalate to project sponsors or functional managers if the resolution requires higher authority.

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Looking for Patterns

Look for **recurring themes** across sprints, retrospectives, or phases.

Use **root cause analysis** to eliminate the underlying causes of repeated blockers.

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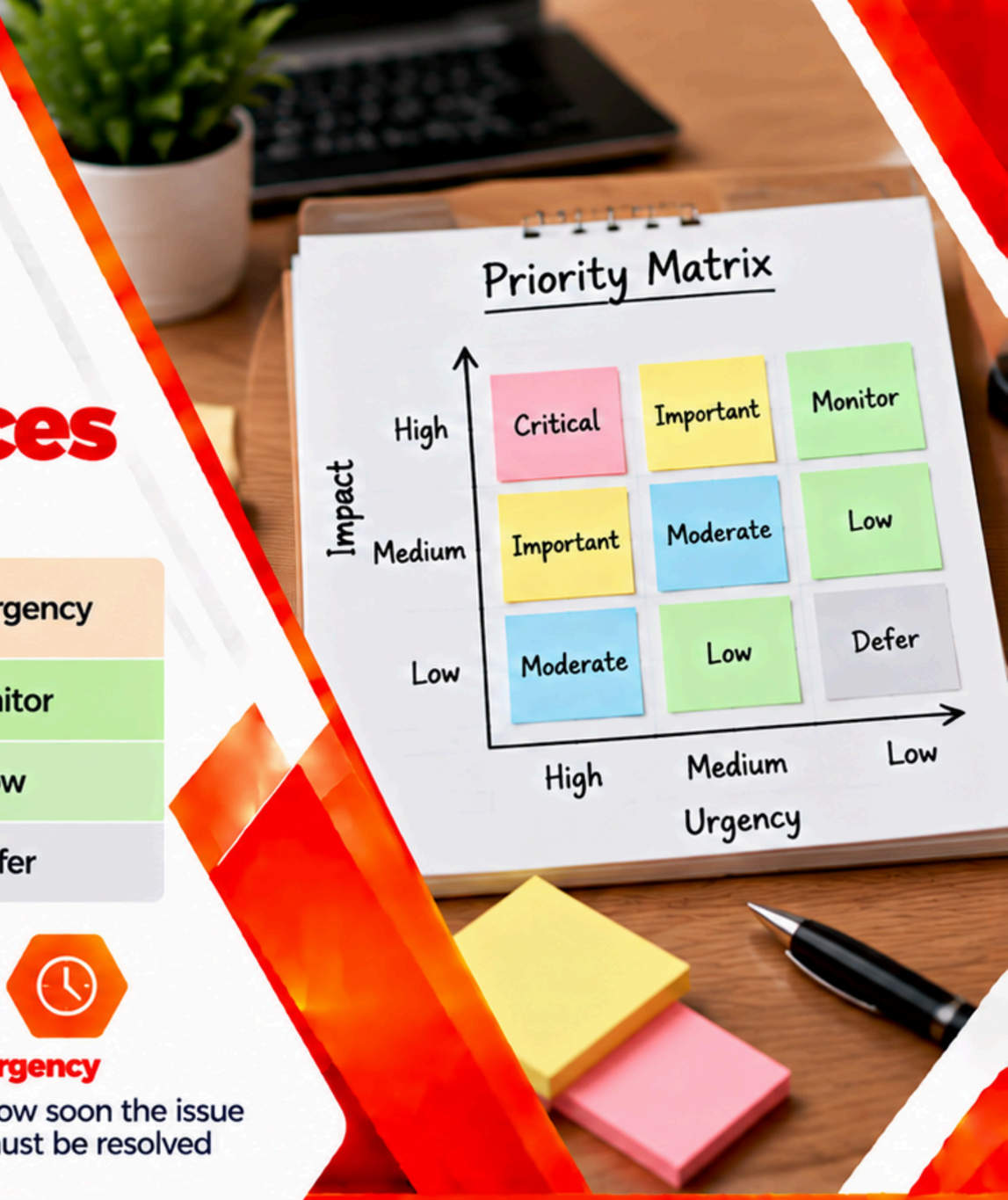
Understanding
Issue Prioritization Matrices

An example of a more detailed —:

Impact / Urgency	High Urgency	Medium Urgency	Low Urgency
High Impact	Critical	Important	Monitor
Medium Impact	Important	Moderate	Low
Low Impact	Moderate	Low	Defer



Impact
Affects scope, schedule, cost, or quality

Probability (optional)
Likelihood of escalation or recurrence

Effort or Complexity (optional)
Difficulty or resources needed to resolve the issue

Urgency
How soon the issue must be resolved

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Determining and Applying an Intervention Strategy to Remove or Minimize Impediments

PMP ECO 3.4.3

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Developing an Intervention Strategy

- Understand the problem context and objectives
- Define a shared vision
- Collect and analyze data
- Develop targeted intervention approaches
- Incorporate team and stakeholder input

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Apply Solutions Through Targeted Actions

Implement the solutions your team identified, getting team members or stakeholders involved as needed.

Leverage your organization's resources, subject matter experts, or external partnerships to address impediments beyond your team's direct control.

Use metrics, feedback, or performance reviews to continuously monitor your solutions' effectiveness.

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Recognizing When a Risk Becomes an Issue

PMP ECO 3.4.5

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Risks and Issues

RISKS	ISSUES
Focused on the future	Focused on the present
Can be positive or negative	Will always be negative
Are documented in the risk register	Are documented in the issue log
Response is called a “risk response”	Response is called a “workaround”

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Issues

PRONE TO ISSUES

- QUALITY RISK
- SCHEDULE CONTROL
- COST
- PROJECT VARIANCE ANALYSIS
- SCOPE CHANGE CONTROL
- PROCUREMENT CONTROL
- COMMUNICATIONS CONTROL

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Recognizing the Transition

Track your trigger points

Monitor each risk, particularly its projected impact date or thresholds.

Monitor risk indicators

Regularly review risk indicators or early warning signs outlined during risk assessment.

Assess unexpected project conditions

Watch for new developments that align with identified risks during project execution.

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Collaborating With Relevant Stakeholders on an Approach to Resolve the Issues

PMP ECO 3.4.6

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Understanding the Issue Clearly

Before an issue can be resolved, it must be clearly understood.

Clearly articulate the issue and its impact:

- Describe the issue in specific, objective terms.
- Explain what is happening and where, and how it affects project objectives (scope, time, cost, or quality).
- Help ensure a shared understanding among stakeholders.
- Support faster and more effective decision-making.

Define the issue based on facts, not assumptions:

- Use objective data, direct observations, or documented evidence.
- Avoid subjective interpretations.
- Focus on the real problem, not the perceived ones.
- Help the team take accurate and effective action.

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Identifying Relevant Stakeholders

Identifying the right stakeholders is essential for resolving issues effectively:

01 Use the stakeholder register to identify who is impacted or can help resolve the issue.

02 Include those directly affected and those who can provide support, resources, or approvals.

03 **Consider a wide range of stakeholders such as:**

- Team members involved in daily work
- Project sponsors with decision-making authority
- Clients or end users affected by the outcome

04 Engage relevant stakeholders early in the resolution process.

05 Help ensure they understand the issue, its impact, and how they can contribute.

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Engaging Stakeholders Early

Engaging stakeholders throughout the project fosters collaboration, diverse perspectives, and better outcomes.

01	**Involve stakeholders early**	... to gather insights and build alignment.
02	**Encourage collaboration**	... to brainstorm solutions and evaluate options.
03	**Use structured techniques**	... to guide the process; use workshops or brainstorming sessions.
04	**Apply active listening**	... to understand perspectives and identify constraints.
05	**Present factual data**	... to present data, explore alternatives, and assess consequences for informed decision-making.

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Promoting Joint Decision-Making

Lean into collaboration, not authority. (1 of 5)

Multicriteria decision analysis

Voting

Consensus building

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Promoting Joint Decision-Making (2 of 5)

Lean into collaboration, not authority.

Multicriteria Decision Analysis

Voting

Consensus-Building

- Uses a decision matrix to evaluate and rank options.
- Applies criteria such as risk, uncertainty, and value.
- Criteria are weighted to help ensure consistent evaluation.
- Tools include prioritization matrices and analytic hierarchy process (AHP) software.
- Generates scores to identify and rank the best alternatives.

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Promoting Joint Decision-Making (3 of 5)

Lean into collaboration, not authority.

Multicriteria decision analysis

Analysis with artificial intelligence (AI):

- Evaluates **multiple criteria** simultaneously
- Applies **advanced algorithms** for faster decision-making
- Enables a **balanced scorecard** approach
- Prioritizes projects by **overall value and feasibility**

Voting

Consensus building

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Promoting Joint Decision-Making (4 of 5)

Lean into collaboration, not authority.

Multicriteria decision analysis

Voting

Consensus building

Voting is a group decision-making and assessment technique used to evaluate multiple alternatives and determine a desired future outcome. It helps teams generate, classify, and prioritize product requirements or ideas.

- **Unanimity:** A decision is reached when everyone agrees on a single course of action.
- **Majority:** A decision is reached when more than 50% of the group supports an option.
- **Plurality:** A decision is made by the largest block of votes, even if it's not a majority.

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Promoting Joint Decision-Making (5 of 5)

Lean into collaboration, not authority.

- **Multicriteria decision analysis**
- **Voting**
- **Consensus-building**

To arrive at a consensus, use a collaborative approach:

- Focus on understanding **multiple perspectives** in conflict situations.
- Treat consensus as a goal when **trust and time** are available.
- Incorporate multiple viewpoints through **open dialogue**.
- Encourage a cooperative attitude and **win-win outcomes**.
- Build commitment through **inclusive discussion** that typically leads to consensus.

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Coordinating With Resource Owners and Functional Managers

Engage resource managers early.

Confirm resource availability.

Escalate any gaps before they impact work.

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Documenting Agreements and Action Plans

Log the agreed-on resolution and assign responsibilities in the issue log or action register.

ID	Description	Opened	Due Date	Priority	Owner	Status	Assigned action	Comments
25	Pressure transport Truck strike	Jan 15	Feb 01	High	Ang Fen	Open	Tasks are on the critical path	company to resolve
26	Glazing General service down	Jan 15	Feb 01	Medium		Open	Locate alternate suppliers contractor and obtain pricing	Looking into another supplier
27	Josie Bynoe is dissatisfied	Jan 15	Feb 01	High	Ang Fen	Open	Work with Josie to identify why she is dissatisfied and work on an action plan	Risks board withholding operating funds

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Reassessing Continually to Help Ensure Impediments, Obstacles, and Blockers Are Being Addressed

PMP ECO 3.4.4

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Keeping Issues Under Control

- **Raise issues** at every status meeting to keep them visible.
- **Limit open issues to a manageable number** to avoid overload.
- **Escalate issues** that exceed thresholds or impact the project to the project sponsor or key stakeholders.
- **Continuously reassess** to help ensure solutions are working and new issues are addressed.

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Monitoring and Following Up

After implementing the solution:

- **Monitor** the solution's effectiveness.
- **Follow up** with stakeholders to address concerns or needed adjustments.
- **Communicate** progress and results to all relevant stakeholders.
- **Foster collaboration** to leverage stakeholder expertise.
- **Resolve issues** efficiently and maintain project momentum.

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Reassessing Continually

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Integrating Lessons Into Ongoing Planning

To integrate lessons into planning:

Feed insights into:

- The risk register
- Retrospective notes
- Continuous improvement plans.

Update team agreements or process documentation.

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Reassessing During Retrospectives and Reviews

In adaptive environments:
Use sprint retrospectives to evaluate how well past impediments were resolved.

In predictive environments:
Use phase-end reviews to reflect on blocker resolution processes.

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Issue Resolution Guidelines

Track problems, inconsistencies, or conflicts and move toward **resolution.**

- As issues arise, promptly add them to the issue log.
- Assign an owner to each issue.
- Give realistic due dates.
- Discuss issues at every status meeting.
- Limit open issues to a manageable number.
- Don't hesitate to escalate!

ID	Description	Opened	Due Date	Priority	Owner	Status	Assigned action	Comments
25	Truck strike	Jan 15	Feb 01	High	Ang Fen	Open	Pressure transport company to resolve	Tasks are on the critical path
26	Glazing General service down	Jan 15	Feb 01	Medium		Open	Locate alternate suppliers contractor and obtain pricing	Looking into another supplier
27	Josie Bynoe is dissatisfied	Jan 15	Feb 01	High	Ang Fen	Open	Work with Josie to identify why she is dissatisfied and work on an action plan	Risks board withholding operating funds

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End of Lesson 7

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THANK YOU!